In Re Fred S. Deutsch Testamentary Trust No. 2 Case No. 0451442

Bagdasarian, Gary G. (for Raymond A. Love – Trustee – Petitioner)

Petition by Trustee for Leave to Resign and For Appointment of Successor Trustee

	DAVAGNID A LOVE T. L. CH. EDED & DEVISOR	NEEDS (DDODLENS (OO) AND TO
	RAYMOND A. LOVE , Trustee of the FRED S. DEUTSCH TESTAMENTARY TRUST NO. 2 , is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner states the Fred S. Deutsch Testamentary Trust No. 2 was created under that certain Last Will	Note: Petitioner's bond at appointment was set at \$80,000.00 based on property on hand at that time.
Aff.Sub.Wit.	and Testament of Fred S. Deutsch in the Order Settling Second Account Current and Report of Executor and for Third Preliminary Distribution filed	Probate Code §17201 requires that the petition list each person entitled to notice.
Inventory PTC Not.Cred. Votice of Hrg	12-15-86 (attached). Petitioner requests the Court take judicial notice as may be appropriate of the Estate of Fred S. Deutsch, Fresno Superior Court Case # 0257636-6.	Petitioner states the <u>sole income</u> <u>beneficiary</u> is Betty L. Andersen of Wilsonville, OR, but does not state that she is the only person entitled to
✓ Aff.Mail W Aff.Pub. Sp.Ntc.	Petitioner was appointed on 4-20-94 as the Second Successor Trustee after resignation of the initial Trustee, Wells Fargo Bank, N.A., on 7-20-92, and	notice per Probate Code § 17203. Need clarification. 2. Betty L. Andersen, the sole income
Pers.Serv. Conf. Screen Letters	subsequent resignation of James Ford (first Successor Trustee) on 4-20-94.	beneficiary, signed a Consent to the appointment of Ms. Kosbie as Successor Trustee, but the Consent does not waive bond.
Duties/Supp Objections Video Receipt CI Report	Pursuant to Declaration of Raymond A. Love Concerning Resignation and Recommendation of Trustee (attached), Petitioner resigns effective upon appointment of a successor trustee and recommends the appointment of GLORIA KOSBIE,	Probate Code § 15602 requires bond except under compelling circumstances, which may include waiver by all adult beneficiaries.
9202 ✓ Order	a licensed Certified Public Accountant and California licensed fiduciary (resume attached).	Therefore, need waiver of bond from Betty L. Anderson.
	Petitioner states the total estimated market value of the assets of the Deutsch Trust No. 2 is \$40,941.36. Petitioner requests that Ms. Kosbie be appointed without bond due to the relative small size of the	3. If bond is not waived, the Court may require further information to calculate bond pursuant to Probate Code §15602(c).
	trust, the continuing cost of furnishing bond, and the fact that Ms. Kosbie is a licensed CPA and licensed fiduciary, carrying her own professional liability insurance and business insurance.	Petitioner provides the current Property on Hand and market value of the assets as \$40,941.36; however, the Court may wish to consider and include income and cost of recovery
	Consent to Act as Trustee signed by Ms. Kosbie was filed 4-17-12.	in the calculation. If required, the Court will set status hearing on Friday 7-27-12 for proof of bond.
	Petitioner requests that: 1. The Court appoint Gloria Kosbie as Successor	25110.
Aff. Posting	Trustee of the Fred S. Deutsch Testamentary	Reviewed by: skc
Status Rpt	Trust No. 2;	Reviewed by: 3RC
UCCJEA	2. The Court determine the amount of bond, if	Updates:
Citation	any, that is required by the Successor Trustee under the circumstances; and	Recommendation:
FTB Notice	The Court make all further and proper orders that the Court may deem necessary.	File 1A – Wells Fargo
	marine countillay acciminecessary.	1 A

1B Atty Atty

In Re: Deutsch Park and Botanical Gardens Charitable Trust Case No. 0451442 Bagdasarian, Gary G. (for Raymond A. Love – Trustee – Petitioner)
Wall, Jeffrey L. (for The Discovery Center – Beneficiary – Objector)
Petition by Trustee for Leave to Resign and For Appointment of Successor Trustee

			RAYMOND A. LOVE, Trustee of the DEUTSCH PARK AND	NEEDS/PROBLEMS/
			BOTANICAL GARDENS CHARITABLE TRUST, is Petitioner.	COMMENTS:
>	Aff.Sub.Wit. Verified Inventory		Petitioner states the Deutsch Park Trust was created under that certain Order Settling First Account Current and Report of Successor Administrator with Will Annexed, Approving Deutsch Park and Botanical Gardens Charitable Trust Agreement and Appointing First Trustee Thereof filed 9-15-95 (attached).	Note: If the petition is granted and if bond is required, the Court will set status hearing on Friday 7-27-12 for proof of bond.
	PTC		Petitioner at all times mentioned and been and is now the	
	Not.Cred.		Court-appointed Trustee of the Deutsch Park Trust. The Fred S.	
~	Notice of		Deutsch Testamentary Trusts No. 3 and 4 were terminated and distributed 95% to Deutsch Park Trust and 5% to the	
~	Hrg	,	Fresno Metropolitan Museum of Art, History & Science	
	Aff.Mail	W	Endowment Fund by Order filed 3-6-00 (attached).	
	Aff.Pub. Sp.Ntc.		Potitionar states the Doutsel Poul To stie and subject to	
	Pers.Serv.		Petitioner states the Deutsch Park Trust is not subject to continuing court administration; however, pursuant to the	
	Conf.		1995 Order:	
	Screen			
	Letters		"The trustee or co-trustee shall make, or cause to be made, such annual reports, tax returns, and accounts of the	
	Duties/Supp		administration of the charitable trust, and shall make, and file	
~	Objections		such reports, returns and accounts, with applicable	
	Video		authorities, and comply with all applicable reporting	
	Receipt		requirements."	
	CI Report 9202		Said provision has previously been interpreted to mean that,	
-	9202 Order		because there is no designated beneficiary to which the	
	Aff. Posting		Trustee is to report, annual accountings and tax returns have been provided to the FRESNO DISCOVERY CENTER , which is	Reviewed by: skc
	Status Rpt		charged with the duty to care, preserve, and maintain the	Reviewed on: 6-1-12
	UCCJEA		Deutsch Cacti Collection. Furthermore, the Trustee is required	Updates:
	Citation		to provide the CITY OF FRESNO a 15-day notice before any	Recommendation:
	FTB Notice		principal distributions are made to the Discovery Center.	File 1B – Wells Fargo
			Pursuant to Declaration of Raymond A. Love Concerning Resignation and Recommendation of Trustee (attached), Petitioner resigns effective appoint appointment of a successor trustee and recommends appointment of GLORIA KOSBIE , a licensed Certified Public Accountant and California licensed fiduciary (resume attached).	
			<u>SEE PAGE 2</u>	
				1 D

1B In Re: Deutsch Park and Botanical Gardens Charitable Trust Case No. 0451442

Page 2 of 3

The attached Statement of Financial Position as of 9-30-11 reflects a total value of \$140,404.00. Petitioner requests that Ms. Kosbie be appointed without bond due to the relative small size of the trust, the continuing cost of furnishing bond, and the fact that Ms. Kosbie is a licensed CPA and licensed fiduciary, carrying her own professional liability insurance and business insurance. Consent to Act as Trustee signed by Ms. Kosbie was filed 4-17-12.

Petitioner requests that:

- 1. The Court appoint Gloria Kosbie as Successor Trustee of the Deusch Park and Botanical Gardens Charitable Trust;
- 2. The Court determine that annual accountings be provided to the Fresno Discovery Center and to no other party;
- The Court determine the amount of the bond, if any, that is required by the Successor Trustee under the circumstances; and
- 4. The Court make all further and proper orders that the Court may deem necessary.

Objection was filed 5-24-12 THE DISCOVERY CENTER (Gary Pigg, President) states:

The Discovery Center does not oppose the decision of Petitioner to resign as trustee, but does oppose all other requests in the Petition. The Center is disappointed that he no longer wishes to serve, but understands it is a personal decision.

Objector notes that the reference to "Fresno Discovery Center" is incorrect. The Discovery Center is a California non-profit corporation and non-profit charitable organization under IRC §501(c)(3), and is the sole beneficiary of the Deutsch Park Trust. The Center was established in 1954 as a non-profit entity for the purpose of providing an enriching hands-on education experience for school-age children in Fresno County, and relies entirely on donations for its support and continued functioning.

Level of Funding: The Center cannot continue to maintain the Deutsch Collection without the current minimum level of funding (approx. \$1,200/mo). Despite the fact that the income generated by the Trust's assets is far less than that amount, Mr. Love has been creative in his efforts to provide the necessary funding throughout his tenure as trustee.

There is nothing in the Petition that provides any assurance that the current level of funding would continue. If it does not continue, the Center does not have the resources to continue maintaining the Collection and might have no alternative but to abandon it, which would frustrate the wishes of the benefactor, Fred S. Deutsch, who established the Collection, and whose charitable gift made the display of the Collection possible.

Bond: Ever since the Court approved transfer of the Collection to the Center, there has been a court-ordered bond in place for the protection of the Center as sole beneficiary. The Center is very uncomfortable with the pending request to dispense with the requirement of a bond, which provides better protection for a beneficiary than professional liability insurance.

Distant Trustee: Mr. Love has worked well with the Center in providing support, in part because he is a local person with whom the Center can speak, in person if necessary, in discussing needs and problems in relation to the Collection. The Center has no way to know if Ms. Kosbie has the intention of providing a similar level of communication and support, and has misgivings about moving the trusteeship out of Fresno for that reason. Future communication with the trustee would necessarily become more difficult and less personal if a distant person were to succeed Mr. Love as trustee.

Examiner notes that the address provided for Ms. Kosbie is a Sausalito, CA address.

SEE PAGE 3

1B In Re: Deutsch Park and Botanical Gardens Charitable Trust Case No. 0451442

Page 3 of 3

Financial Accountings: The Petition intimates, without actually stating, that the future trustee will provide financial accountings to the Center, but no details are given in the Petition or supporting declaration. Will the Center be furnished annually with a copy of Form 990 by the trustee in future years? How detailed an accounting does the trustee propose to give the Center concerning the investment of trust funds?

Carry Value of Assets: Petitioner's schedule reflects the carry value of the assets as of 9-30-11. Almost three calendar quarters have elapsed since that schedule was prepared. The Center and the Court should be provided the current carry value of the Trust's assets.

The Discover Center opposes the Petition for the reasons stated above and respectfully asks the Court to deny it.

Mildred G. Williams (CONS/PE)

2

Atty

Atty

Case No. 10CEPR00309

Bagdasarian, Gary G. (for Julia W. MacConochie and Alisa M. Tribbey – Co-Conservators)
Teixeira, J. Stanley (Court Appointed for Conservatee)

(1) First Account and Report of Co Conservators of the Person and Estate; (2) Waiver of Conservator's Compensation; (3) for Payment of Attorney's Fees to the Attorney for the Co-Conservators; (4) for Costs Reimbursement and Delivery of Assets [Prob. C. 1060-1064; 1860; 2620; 2623; 2630; 2640 & 2642]

DOD: 07/24/11		JULIA MACCONOCHIE and ALISA TRIBBEY, Co-	NEEDS (DRODUEAS) (COAAAFNITS:
DOD: 06/24/11		Conservators, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 08/17/10 - 06/24/11	CONTINUED FROM 05/08/12 1. Need Account statements for Conservatee's accounts for the
Cont. from 050812		Accounting - \$322,792.59 Beginning POH - \$242,828.34	end of the accounting periods pursuant to Probate Code §
Aff.Sub.Wit.		Ending POH - \$242,920.07	2620(c). Note: Account statements have been filed for 08/2010 (the
✓ Verified		(\$793.07 is cash)	beginning of the account period)
Inventory		Subsequent Account period: 06/25/11 - 12/09/11	but not for the ending of the
PTC		A a counting COSO OOF FO	account periods (06/24/11 & 12/09/11)
Not.Cred.		Accounting - \$250,095.52 Beginning POH - \$242,920.07	2. The reimbursement of
✓ Notice of Hrg		Ending POH - \$242,127.00	contributions to the
✓ Aff.Mail		(\$0.00 is cash)	conservatorship estate requested by Julia MacConochie includes
Aff.Pub. Sp.Ntc.		Conservators - waive	the following items for which the court may require further
Pers.Serv.		Conservator Julia MacConochie (reimbursement for	information: - \$930.00 to Attorney Laura R.
Conf. Screen		contributions to the conservatorship estate)	- \$930.00 to Attorney Laura R. Spease (03/02/10 & 03/03/10)
Letters		- \$53,379.40 (for payment of taxes, maintenance of real properties of	- \$1,125.00 to Attorney J. Stanley
Duties/Supp		the conservatorship, payment of attorney's fees,	Teixeira (06/17/10_ - \$160.00 Legal documents
Objections		conservatee's board and care expenses, postal expenses, and travel and hotel expenditures, to be	(10/08/10)
Video		paid from the probate estate)	- \$591.39 to Gary Bagdasarian
Receipt			(10/09/10) - \$92.00 Tulare Co. Sheriff –
✓ CI Report		Attorney - \$19,375.00 (per declaration, broken down as follows: General –	- \$72.00 folding CO. Sheriff – Fingerprinting (11/16/10)
2620(c)	Χ	Creation of Conservatorship - \$8,100.00, Inventory &	- \$925.00 Westfall Appraisal
✓ Order		Appraisal - \$3,700.00, Sale of property (not	(03/10/11)
		completed) - \$4,350.00, and Accounting - \$3,225.00)	- \$742.68 postal expenses - \$1,478.02 travel expenditures
		Attorney Costs - \$1,204.63 (Probate	- \$1,120.00 hotel expenditures
		referee, filing fees, certified copies, recording fees)	Note to Judge: Pursuant to Local Rule 7.16A and also Probate Code 2640(c)
		Petitioner prays for an order:	Attorney fees and commissions in conservatorships are awarded based
		Approving, allowing and settling the first and final account and the subsequent to the final	upon what is just and reasonable . The
		account;	Local Rules authorize flat fees in the
		Authorizing the attorney fees and costs	amount of \$2,000.00 for the establishment of a Conservatorship
		reimbursement; 3. Authorizing Co-Conservators to deliver	and preparation of the first account
		property remaining in their possession to the	and \$1,000.00 for court confirmed
		personal representative appointed for the	sales of real property. <u>Attorney</u> <u>Bagdasarian is asking for fees in the</u>
		Estate of Mildred G. Williams; and 4. Discharging Petitioners as Co-Conservator of	amount of \$19,375.00 for these same,
		the Person upon filing of an Ex Parte Petition	routine tasks of conservatorships.
Aff. Posting		for Final Discharge and Order and their surety	Reviewed by: JF
Status Rpt		bond be exonerated.	Reviewed on: 05/31/12
UCCJEA	_		Updates:
Citation			Recommendation:
FTB Notice			File 2 - Williams

3A

Atty

Petition to Determine Succession to Real and Personal Property (Prob. C. 13151)

DOD: 5/9/2011			GABRIELA GUERRERO, by her	NE	EDS/PROBLEMS/COMMENTS:
			Guardian, JULIETA GUERRERO ,	Na	ote: Gabriela is a four year old
			is petitioner.		inor
			·	l ''''	
	nt. from 12141)112, 021512,	1,	40 days since DOD.	1.	Fee waiver was denied on
	2812, 042512 2812, 042512		·		2/15/12. Filing fee of \$395.00 and has not been paid for this
	Aff.Sub.Wit.		No other proceedings.		petition. (Note: Filing fees are
/	Verified				considered costs of
	Inventory		Decedent died intestate.		administration and must be paid
	PTC				prior to property being distributed to beneficiaries.)
	Not.Cred.		I & A – \$127,483.00 (see note		distributed to bettericidities.
✓	Notice of		#2)	2.	Inventory and Appraisal was not
	Hrg		,		signed by the Probate Referee as
✓	Aff.Mail	W/	Petitioner requests Court		required.
	Aff.Pub.		determination that	3.	#9a(3) of the petition was not
	Sp.Ntc.		decedent's interest in real		answered re: issue of
	Pers.Serv.		and personal property pass to		predeceased child.
	Conf. Screen		Gabriela Guerrero pursuant to	1	Attachment 11 of the petition
	Letters		intestate succession.	4.	does not include the decedent's
	Duties/Supp		111031010 30000331011.		interest in the property.
	Objections				
	Video				
	Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting			Re	eviewed by: KT
	Status Rpt			Re	viewed on: 6/1/12
	UCCJEA			Up	odates:
	Citation			Re	commendation:
	FTB Notice			File	e 3A - Guerrero
					2Λ

3A

Petition for Waiver of Appraisal by Probate Referee and Statement of Cause

Age: 5/9/2011			GABRIELA GUERRERO, as	NE	EDS/PROBLEMS/COMMENTS:
			Guardian of the estate of JULIETA	1	Petitioner states she is the
<u> </u>			GUERRERO, is petitioner.	1.	acting personal representative
					of the estate. Need letters of
<u> </u>	ont. from		Petitioner states there is good		Probate showing Petitioners
H	Aff.Sub.Wit.		cause to justify the court waiving		appointment as personal representative.
✓			appraisal by the probate	2.	Petition states there is good
	Inventory		referee.		cause to justify the court
<u> </u>	PTC				waiving appraisal by a probate
_	Not.Cred.		Wherefore, Petitioner prays for an		referee in these proceedings on the grounds set forth in the
	Notice of Hrg	Χ	Order:		Statement of Good Cause.
	Aff.Mail	Χ			There is not statement of good
	Aff.Pub.	,,	1. Waiving the appraisal by the	3	cause included in the petition. Need Notice of Hearing.
	Sp.Ntc.		probate referee in these	3. 4.	•
	Pers.Serv.		proceedings for the		Notice of Hearing on Julieta
	Conf.		administration of the	_	Guerrero, beneficiary.
	Screen		decedent's estate.	5.	Court may require notice to be served on the Probate Referee
	Letters				pursuant to Probate Code
<u> </u>	Duties/Supp				§8903.
_	Objections			6.	Inventory and appraisal
	Video Receipt				attached to the petition (completed by the petitioner
	CI Report				and not the probate referee)
	9202				deducts a creditor's claim in
1	Order				the amount of \$10,417.00. The
*					inventory and appraisal should only include the property of the
					decedent on the date of
					death. Creditor's claims should
_					not be listed on an inventory.
 	Aff. Posting				viewed by: KT
\parallel	Status Rpt UCCJEA				viewed on: 6/1/12 dates:
	Citation				commendation:
	FTB Notice				e 3B - Guerrero
<u> </u>	2			u	3R

4 Bryan Kent Begbie aka Bryan K. Begbie aka Bryan Begbie (Estate)

Case No. 12CEPR00301

Atty Markeson, Thomas A. (for Sherry Morris Begbie – Spouse/Petitioner)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

spouse, is Petitioner and requests appointment as Administrator with bond amount to be determined. Cont. from 050912	DC	D: 03/26/12	SHERRY MORRIS BEGBIE, surviving	NEEDS/PROBLEMS/COMMENTS:
cont. from 050912 Aff. Sub. Wit. Aff. Sub. Wit. Verified Inventory PTC Not. Cred. Notice of Hrg Aff. Pub. Sp. Ntc. Pers. Serv. Conf. Screen Video Rescipt CI Report Probate Referee: RICK SMITH Aff. Posting Status Rpt UCCJEA Aff. Posting Status Rpt UCCJEA Aff. Posting Status Rpt UCCJEA Cont. Cont. Cord. Corder to Deposit Money into a Blocked Account was also provided by Petitioner. Publication: The Business Journal Aff. Posting Status Rpt UCCJEA Cont. Corder to Deposit Money into a Blocked Account was also provided by Petitioner. Priday, November 2, 2012 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:			spouse, is Petitioner and requests	CONTINUED EDOM OF 100 /12
Cont. from 050912 With bond amount to be determined.			_ ·	CONTINUED FROM 05/09/12
Conf. from 050912 Aff. Sub. Wit.			• •	Note:
Aff. Sub. Wif. Verified Inventory PTC Not.Cred. Notice of Hrg Sp.Ntc. Pers.Serv. Conf. Screen Video Receipt Objections Video Receipt CI Report 9202 Vorder Aff. Posting Status Rpt UCCJEA Aff. Posting Status Rpt UCCJEA Citation Full IAEA – OK Decedent died intestate Decedent died intestate Residence: Clovis Publication: The Business Journal Blocked Account was also provided by Petitioner. Note: If the Petition is granted, status hearings will be set as follows: Friday, November 2, 2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and approisal and Friday, August 2, 2013 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:	Co	nt. from 050912		
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PTC		Inventory	TI OII IALA - OK	· ·
Notice of Hrg Residence: Clovis ✓ Aff.Mail W/ ✓ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen ✓ Duties/Supp Objections Video Receipt CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation Decedent aled intestate Residence: Clovis Residence: Clovis Publication: The Business Journal Rote: If the Petition is granted, status hearings will be set as follows: Friday, November 2, 2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and Residence: Clovis Publication: The Business Journal Note: If the Petition is granted, status hearings will be required appraisal and 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and appraisal and properties of the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:		PTC		•
Hrg		Not.Cred.	Decedent died intestate	
✓ Aff.Pub. Publication: The Business Journal Sp.Ntc. ESTIMATED VALUE OF THE ESTATE: Pers.Serv. Pers.Serv. Personal property - \$175,000.00 Friday, November 2, 2012 at 9:00a.m. in Dept. 303 for the filling of the inventory and appraisal and ✓ Letters ✓ Duties/Supp Objections Video Receipt Friday, August 2, 2013 at 9:00a.m. in Dept. 303 for the filling of the first account and final distribution. ✓ Order Order Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Aff. Posting Status Rpt Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:	✓	Notice of		
✓ Aff.Pub. Sp.Ntc. ESTIMATED VALUE OF THE ESTATE: Pers.Serv. Personal property - \$175,000.00 Conf. Screen Probate Referee: RICK SMITH • Friday, November 2, 2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Friday, August 2, 2013 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Video Receipt P202 ✓ Order Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Aff. Posting Status Rpt Reviewed by: JF UCCJEA Citation Recommendation:		; 		provided by Petitioner.
Sp.Ntc. Sp.Ntc. Pers.Serv. Conf. Screen Video Receipt Porder Pord	√		<u>/ </u> Publication: The Business Journal	Note: If the Petition is granted status
Sp.Ntc. Pers.Serv. Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation ESTIMATED VALUE OF THE ESTATE: Personal property - \$175,000.00 \$175,00	✓	! !		
Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt Filling of the inventory and appraisal and • Friday, August 2, 2013 at 9:00a.m. in Dept. 303 for the filling of the inventory and appraisal and • Friday, August 2, 2013 at 9:00a.m. in Dept. 303 for the filling of the first account and final distribution. CI Report 9:202 ✓ Order Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:			ESTIMATED VALUE OF THE ESTATE:	
Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt Probate Referee: RICK SMITH Friday, August 2, 2013 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filled 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Aff. Posting Status Rpt UCCJEA Citation Friday, August 2, 2013 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Friday, August 2, 2013 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Friday, August 2, 2013 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and) 	Personal property - \$175,000.00	
✓ Letters ✓ Duties/Supp • Friday, August 2, 2013 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Video Receipt Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Aff. Posting Status Rpt UCCJEA Reviewed on: 05/31/12 Updates: Recommendation:				
V Duties/Supp • Friday, August 2, 2013 at Video Receipt 9:00a.m. in Dept. 303 for the filling of the first account and final distribution. CI Report Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Aff. Posting Reviewed by: JF Status Rpt Reviewed on: 05/31/12 UCCJEA Updates: Citation Recommendation:		! !	Probate Referee: RICK SMITH	
Objections Video Receipt CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation Pisona.m. in Dept. 303 for the filling of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:	V	l		appraisai <u>aria</u>
Video Receipt CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation Filing of the first account and final distribution. Fursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:	Ľ			• Friday, August 2, 2013 at
Receipt CI Report 9202 ✓ Order Aff. Posting Status Rpt UCCJEA CI Report final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:		<u> </u>		<u>-</u>
CI Report 9202 ✓ Order Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: JF Status Rpt UCCJEA UCCJEA Citation Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:				
Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Aff. Posting Status Rpt UCCJEA UICCJEA Citation Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:		 	_	final distribution.
✓ Order required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Aff. Posting Reviewed by: JF Status Rpt Reviewed on: 05/31/12 UCCJEA Updates: Citation Recommendation:			=	Pursuant to Local Rule 7.5 if the
Aff. Posting Status Rpt UCCJEA Citation Drior to the hearings on the matter the status hearing will come off calendar and no appearance will be required. Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:	—		_	required documents are filed 10 days
Aff. Posting Status Rpt UCCJEA Citation Calendar and no appearance will be required. Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:		Oldei		
Aff. Posting Status Rpt UCCJEA Citation Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:				
Aff. Posting Status Rpt UCCJEA Uiccitation Reviewed by: JF Reviewed on: 05/31/12 Updates: Recommendation:				• •
Status Rpt Reviewed on: 05/31/12 UCCJEA Updates: Citation Recommendation:				requirea.
Status Rpt Reviewed on: 05/31/12 UCCJEA Updates: Citation Recommendation:				
UCCJEA Updates: Citation Recommendation:		Aff. Posting		Reviewed by: JF
Citation Recommendation:		Status Rpt		Reviewed on: 05/31/12
		UCCJEA		
File 4 - Begbie				
		FTB Notice		File 4 - Begbie

Luis G. Hinojosa (Estate)

Objections

Video

9202

Order

Receipt

CI Report

Aff. Posting

Status Rpt

UCCJEA

Citation

FTB Notice

Case No. 12CEPR00353

Atty Krause Cota, Stephanie J (for Petitioner Jose Diaz)

Bagdasarian, Gary G. (for Competing Petitioner Julio Hinojosa) Atty

Petition for Letters of Administration; Authorization to Administer Under IAEA

(Prob. C. 8002, 10450) DOD: 09/25/2011 **JOSE DIAZ**, an interested party, is Petitioner and requests appointment as Administrator

with bond to be determined. Full IAEA- o.k. Cont. from Aff.Sub.Wit. Verified Decedent died intestate Inventory PTC Not.Cred. Residence: Fresno Notice of Publication: The Business Journal Hrg Aff.Mail Aff.Pub. Estimated value of the Estate: Sp.Ntc. Personal Property - TBD Pers.Serv. Real Property - TBD Conf. Total: - TBD Screen Letters Χ **Duties/Supp**

Probate Referee: Rick Smith

NEEDS/PROBLEMS/COMMENTS:

Note:

Competing petition was filed on 05/07/2012 by decedent's son Julio Hinojosa and is set for hearing on 06/18/2012.

- 1. Need name and date of death of decedent's parents per Local Rule 7.1.1D.
- 2. Need Letters
- 3. Need Duties and Liabilities of Personal Representative.
- 4. Petition requests bond to be determined. Need estimated value of the estate.

Note: If the petition is granted status hearings will be set as follows:

- Friday, November 2, 2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and
- Friday, August 2, 2013 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

Reviewed by: KT/LV **Reviewed on:** 05/31/2012 **Updates: Recommendation:** File 5 - Hinojosa

Atty Krause, Stefanie J., sole practitioner (for Petitioner Sylvia Holder)

Spousal or Domestic Partner Property Petition (Prob. C. 13650)

DOD: 2/15/2012			SYLVIA HOLDER, surviving spouse, is
			Petitioner.
			No other proceedings.
С	Cont. from		
	Aff.Sub.Wit.		Decedent died intestate.
✓	Verified		Petitioner states:
	Inventory		 On the date of Decedent's death,
	PTC		Decedent was the record owner of
	Not.Cred.		the subject real property at 5530 W.
✓	Notice of		Norwich Ave., Fresno, which was
	Hrg		purchased jointly by Petitioner and
✓	Aff.Mail	W/	Decedent in late 1994, with an
	Aff.Pub.		amount not exceeding \$500.00
	Sp.Ntc.		(based on Petitioner's recollection,
	Pers.Serv.		as bank records are no longer
	Conf.		available) that was put down to
	Screen		purchase the property; this amount was paid out of the shared joint
	Letters		checking account of Petitioner and
	Duties/Supp		Decedent;
	Objections		Petitioner and Decedent were
	Video		married on 2/4/1995, and
	Receipt		throughout their marriage they used
	CI Report		community property [funds] to pay
	9202		the mortgage on the real property;
\	Order		 In 2003, Petitioner and Decedent
			refinanced the property; at that
			time, Petitioner signed an
			Interspousal Transfer Deed stating
			the property was the sole and separate property of Decedent;
			however, the Deed also stated it
			was " not a change in ownership
			under Section 63 of the Revenue
			and Taxation Code" [emphasis in
			Petition];
			Petitioner did not understand when
			she signed the document nor at any
-	A (,		time thereafter that she was
_	Aff. Posting		potentially affecting her ownership
\vdash	Status Rpt		interest in the real property;
\vdash	UCCJEA		Diamaga and allies well as a second
\vdash	Citation		~Please see additional page~
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS:

- 1. Petitioner provides two alternatives for distribution of the real property under Probate Code § 6401 (a) or (c) depending on whether the property is characterized as community or separate. Since Petitioner is alleging the property is community based upon the marriage and upon the use of community property funds for purchase, the Petitioner's alternative distribution allegations create uncertainty as to the initial title and to the circumstances under which the Interspousal Transfer Deed was signed in 2003, and as a result, create uncertainty as to the character of the real property. Need additional information regarding the reasons for said transfer of the subject real property in 2003 into Decedent's name alone in order for the Court to determine whether the real property is community or separate.
- 2. Petition includes statements regarding previous distribution of personal property to Decedent's two children; however, Petition does not describe any personal property in Attachment 7(a) or 7(b), and it appears inappropriate to reference such personal property, thereby bringing it into consideration subject to this Petition and affecting the real property characterization and manner of distribution.

Reviewed by: LEG **Reviewed on:** 6/1/12 **Updates: Recommendation:** File 6 – Holder

Additional Page 6, Jeffrey Lee Holder, Sr. (Spousal) Case No. 12CEPR00354

Petitioner states, continued:

- After the change in title, Petitioner and Decedent continued to pay the mortgage, taxes, etc., with community property [funds];
- Since community property was used to pay for the property, with the exception of the initial \$500.00 purchase, Petitioner requests the Court confirm that Petitioner owned a ½ interest in the house at the time of Decedent's death, minus **\$250.00**;
- Under Probate Code § 6401(a), 100% of Decedent's community property interest will go to Petitioner;
- Under Probate Code § 6401(c), 1/3 of Decedent's separate property belongs to his spouse (Petitioner), and 1/3 goes to each of Decedent's two children, JEFFREY LEE HOLDER, JR. and MELISSA CHRISTINE PERRYMEN; thus, the three beneficiaries will split \$250.00, which represents Decedent's ½ of the down payment on the real property;
- Since Petitioner already distributed many of Decedent's personal effects to his children, the value of which greatly exceeded **\$84.00** [which approximately represents 1/3 of \$250.00], Petitioner asks that the entire amount of Decedent's separate property interest be granted to Petitioner;

Petitioner requests: a determination that **100%** of Decedent's interest in the real property passed to her.

Note: Proposed order submitted by Petitioner finds that:

- 1. Court determines that ½ interest in real property located at 5530 Norwich Ave., Fresno, passes to Petitioner: and
- 2. Court confirms that ½ interest in the real property located at 5530 Norwich Ave., Fresno, belongs to Petitioner.

7A Doris MacDonell Frazer aka Doris M. Frazer (Estate) Case No. 12CEPR00377

Arthur, Susan K. (for Theresa Barnard – daughter/Petitioner)

Atty Frazer, Glen Maura (pro per – daughter/competing Petitioner)

Amended Petition for Probate of Will and for Letters of Administration With Will Annexed; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	D: 03/03/12							
Со	Cont. from							
	Aff.Sub.Wit.	s/p						
✓	Verified							
	Inventory							
	PTC							
	Not.Cred.							
√	Notice of							
	Hrg							
✓	Aff.Mail	w/						
✓	Aff.Pub.							
	Sp.Ntc.							
	Pers.Serv.							
	Conf.							
	Screen							
✓	Letters							
✓	Duties/Supp							
	Objections							
	Video							
	Receipt							
	CI Report							
	9202							
✓	Order							
	Aff. Posting							
	Status Rpt							
	UCCJEA							
	Citation							
1	FTR Notice							

Atty

THERESA F. BARNARD, daughter, is Petitioner and requests appointment as Administrator with Will Annexed with bond set at \$162,500.00.

Full IAEA - OK

Will dated 02/13/87

Residence: Fresno

Publication: The Business Journal

Estimated Value of the Estate:

Personal property- \$ 32,500.00 Real property - 130,000.00

Total - \$162,500.00

Probate Referee: RICK SMITH

NEEDS/PROBLEMS/COMMENTS:

See page 7B for competing petition.

Note: The named Executors have filed conditional declinations to serve on the condition that Theresa Barnard be appointed as Administrator with Will Annexed. Said declinations state that they will be withdrawn if Theresa Barnard shall at any time fail to continue to serve as administrator.

Note: If petition is granted, status hearings will be set as follows:

- October 5, 2012 for filing of the Inventory & Appraisal
- October 4, 2013 for filing of the First/Final Account and Petition for Distribution

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

Reviewed by: JF

Reviewed on: 06/01/12

Updates:

Recommendation:

File 7A - Frazer

7A

7B Doris MacDonell Frazer aka Doris M. Frazer (Estate) Case No. 12CEPR00377

Arthur, Susan K. (for Theresa Barnard – daughter/competing Petitioner) Atty

Atty Frazer, Glen Maura (pro per – daughter/Petitioner)

> Amended Petition for Probate of Will and for Letters of Administration With Will Annexed; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	D: 03/03/12		GLEN MAURA FRAZER, daughter,	NEEDS/PROBLEMS
			is Petitioner and requests	See page 7A for
			appointment as Administrator	See page /A loi
			with Will Annexed without bond.	Note: The named
Со	nt. from			conditional decli
	Aff.Sub.Wit.	s/p	Full IAEA – NEED	condition that Th
✓	Verified		TOTAL TALLE	appointed as Ad Annexed. Said o
	Inventory		Will dated 02/13/87	they will be without
	PTC		Will dated 02/13/6/	shall at any time
	Not.Cred.		Davidana a Francia	as administrator.
✓	Notice of		Residence: Fresno	1 Nonel Aff
	Hrg		Publication: NEED	 Need Affi Petitioner
✓	Aff.Mail	w/o		appointe
	Aff.Pub.	Х	Estimated Value of the Estate:	because
	Sp.Ntc.		Personal property- \$ 10,000.00	however,
	Pers.Serv.		Real property - 128,000.00	named E
	Conf.		Total - \$138,000.00	Will's wai apply to I
	Screen		,,	be set at
√	Letters		Probate Referee: RICK SMITH	
<u> </u>	Duties/Supp		Trobato Rotoroo. Mon divini	Note: If petition i
	Objections			hearings will be s
	Video Receipt			October
	CI Report			Inventory
	9202			1
√	Order			October 6 First/Final for Distrib
				Pursuant to Loca documents are f hearings on the r hearing will com- appearance will
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 06
	UCCJEA			Updates:
	Citation			Recommendatio
	FTB Notice			File 7B – Frazer

S/COMMENTS:

competing petition.

d Executors have filed linations to serve on the heresa Barnard be dministrator with Will declinations state that drawn if Theresa Barnard fail to continue to serve

- fidavit of Publication.
- er is requesting to be ed without bond the Will waives bond; , Petitioner is not a Executor, therefore the iving of bond does not Petitioner. Bond should \$138,000.00.

is granted, status set as follows:

- 5, 2012 for filing of the y & Appraisal
- 4, 2013 for filing of the I Account and Petition oution

al Rule 7.5 if the required filed 10 days prior to the matter the status ne off calendar and no ll be required.

6/01/12 on:

8

Atty

Atty

Betty Jean Steinhauer (CONS/PE)
Kruthers, Heather H (for Public Guardian – Petitioner) Walters, Jennifer (Court appointed for Conservatee)

Case No. 12CEPR00383

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 79			TEMPORARY EXPIRES 06/06/12	NEEDS/PROBLEMS/COMMENTS:	
DO	B: 06/30/32		DUDUC CHARDIAN is Detitioner and requests		
			PUBLIC GUARDIAN, is Petitioner and requests appointment as conservator of the person with	Court Investigator Advised	
			medical consent powers and dementia powers to	Rights on 05/29/12.	
			administer dementia medications and for		
<u></u>	nt. from		placement in a secured perimeter facility; and for	<u>Voting rights affected – Need</u>	
CO			appointment as conservator of the estate without	<u>Minute Order</u>	
	Aff.Sub.Wit.		bond, with authority to sell the proposed	1 Novel Matter at the order	
✓	Verified		conservatee's former residence, subject to court	1. Need Notice of Hearing .	
	Inventory		confirmation, and authority to sell the proposed	2. Need proof of service by	
	PTC		conservatee's personal property no longer needed.	mail at least 15 days	
				before the hearing of Notice of Hearing with a	
	Not.Cred.		Estimated Value of the Estate:	copy of the Petition for	
	Notice of	Х	Personal property - UNKNOWN	Appointment of Probate	
	Hrg		Annual income (Pension) - \$ 9,202.56	Conservator for:	
	Aff.Mail	Х	<u>Annual income (SSA) - \$15,168.00</u> Total annual income - \$24,370.56	- Timothy Steinhauer	
	Aff.Pub.		TOTAL ALTIDAL IIICOTTIC - 924,070.00	- David Steinhauer	
	Sp.Ntc.		Voting rights affected.	- David Steinhauer	
√	Pers.Serv.			- Ester Hall	
	Conf.		Petitioner states the proposed conservatee had	- Kimberly Steinhauer	
	Screen		been residing in her own home. She has since been	- Ashley Steinhauer	
√			moved into one of her son's home. Although this	1, 1, 1	
v	Letters		appears to be adequate at the time, she has	Note: If petition is granted,	
	Duties/Supp	n/a	reportedly been physically violent with a recent care	status hearings will be set as	
	Objections		provider, most likely due to her dementia. In addition, there is conflict between two of her sons	follows:	
	Video	n/a	and another son. Further, the proposed conservatee	 October 5, 2012 for 	
	Receipt		requires assistance with managing her finances. The	filing of the Inventory &	
✓	CI Report		police are currently investigating an \$8,000.00 check	Appraisal	
	9202		that is missing and one of the sons recently recorded		
√	Order		a quitclaim deed transferring ownership of one of	 October 4, 2013 for 	
•	Order		the conservatee's homes to himself. The	filing of the first	
			conservatee insists that she did not sign over her	account	
			home to her son. If appointed as conservator, the		
			Public Guardian would be able to marshal and	Pursuant to Local Rule 7.5 if	
			protect the conservatee's assets and assist the	the required documents are	
			police in the investigation of any misappropriated funds.	filed 10 days prior to the	
			TOLIUS.	hearings on the matter the	
			Court Investigator Samantha Henson filed a report on	status hearing will come off	
			05/30/12.	calendar and no	
				appearance will be required.	
	Aff. Posting			Reviewed by: JF	
	Status Rpt	<u> </u>		Reviewed on: 06/01/12	
	UCCJEA			Updates:	
✓	Citation			Recommendation:	
	FTB Notice			File 8 - Steinhauer	

9

CHESTER, BRUCE C., sole practitioner (for Petitioner Kevin A. Cornell)

Spousal Property Petition (Prob. C. 13650)

DC	D: 9/25/2011		KEVIN A. CORNELL, surviving spouse, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner.	
			No other proceedings.	
Сс	ont. from		Will dated 3/14/1991 devises entire estate to	
	Aff.Sub.Wit.		her spouse, Kevin A. Cornell.	
✓	Verified			
	Inventory		Petitioner states the subject parcels of real	
	PTC		property should pass to Petitioner because he is the surviving spouse of the Decedent, and	
	Not.Cred.		all of the Decedent's property was given to	
✓	Notice of		Petitioner in the Decedent's last Will (copy	
	Hrg		attached as Attachment 4(c)). Petitioner also	
✓	Aff.Mail	W/O	states the subject parcels of real property	
	Aff.Pub.		should be confirmed to Petitioner because	
	Sp.Ntc.		such property represents Petitioner's ½ community property interest in the property,	
	Pers.Serv.		which was acquired by the Decedent and	
	Conf.		Petitioner with community property funds	
	Screen		while they were married and domiciled in the	
	Letters		state of California.	
	Duties/Supp		D-PP	
	Objections		Petitioner requests: 3. Court determination that ½ interest in real	
	Video		property parcels located at: (a) 852	
	Receipt		Carson Ave., Clovis; (b) 10134 N. Grouse	
	CI Report		Run, Fresno; (c) 897 E. Ridgecrest Drive,	
	9202		Fresno; (d) 12894 Anderson Road, Lower	
✓	Order		Lake, CA; and (e) 12896 Anderson Road,	
	Aff. Posting		Lower Lake, CA, passes to her; and	Reviewed by: LEG
	Status Rpt		4. Court confirmation that ½ interest in real	Reviewed on: 6/1/12
	UCCJEA		property parcels located at: (a) 852	Updates:
<u> </u>	Citation		Carson Ave., Clovis; (b) 10134 N. Grouse	Recommendation: SUBMITTED
	FTB Notice		Run, Fresno; (c) 897 E. Ridgecrest Drive,	File 9 - Cornell
			Fresno; (d) 12894 Anderson Road, Lower	
			Lake, CA; and (e) 12896 Anderson Road,	
			Lower Lake, CA, belongs to her.	

- Atty Motsenbocker, Gary L., sole practitioner (for Petitioner Public Guardian, Conservator)
- Atty Knudson, David, sole practitioner (for Respondent Virginia Greggains, daughter)
- Atty J. Stanley, Teixeira, sole practitioner (Court-appointed for Conservatee)

Probate Status Hearing Re: Filing of the Next Account

Age: 89 years	NEEDS/PROBLEMS/COMMENTS:
DOB: 8/11/1922	
	OFF CALENDAR
Cont. from	Second Account Current and
Aff.Sub.Wit.	Report of Conservator, etc. was
Verified	filed on 2/14/2012.
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	Reviewed by: LEG
Status Rpt	Reviewed on: 6/1/12
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 10 - Fly

Probate Status Hearing Re: Filing of Inventory and Appraisal

	MYRNA M. BOWMAN was	NEEDS/PROBLEMS/COMMENTS:
	appointed as conservator of the person and estate without bond on 9/28/11.	Continued from 4/25/12. As of 5/31/12 the following issues remain:
Cont. from 030712, 042512 Aff.Sub.Wit.	Letters issued on 10/7/11.	Inventory and Appraisal filed on 4/11/12 is defective as follows:
Verified Inventory PTC	Inventory and appraisal filed on 4/11/12.	 a. It does not include the property tax certificate.
Not.Cred.		b. Is not signed by the attorney.
Notice of Hrg		c. Assets (including money
Aff.Mail		market account, real
Aff.Pub.		property, personal belongings
Sp.Ntc.		and a sailboat) need to be appraised by the probate
Pers.Serv.		referee.
Conf.		
Screen Letters		Need corrected Inventory and Appraisal.
Duties/Supp		дрргизи.
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 5/31/12
UCCJEA		Updates: Recommendation:
Citation FTB Notice		File 11 - Robbins
FID NOTICE		riie 11 - KODDIIIS

Atty

12

Mello, Elizabeth A., of Law Offices of Tina Barberi (for Julieta Guerrero, Guardian)

Status Hearing

Age: 5 years	JULIETA GUERRERO, mother, was appointed	NEEDS/PROBLEMS/COMMENTS:
DOB: 5/5/2007	Guardian of Estate without bond on	
	5/11/2012.	Please refer to related case on
		Pages 3A and 3B of this
	Petitioner requested in her Amended Petition	calendar.
Cont. from	for Appointment of Guardian specific powers	
	under Probate Code § 2590 to allow the	Note: Petitioner is Spanish-
Aff.Sub.Wit.	guardian power to pay, collect, compromise,	speaking.
Verified	arbitrate or otherwise adjust claims, debts or	
Inventory	demands upon the property, and to enter	Note: It is unclear whether this
PTC	into contracts necessary for the maintenance	status hearing was set for
Not.Cred.	of the property, among other powers.	Petitioner's submission of an
Notice of	Minute Order dated 4/25/2012 from the	Order Appointing Guardian of
Hrg	Minute Order dated 4/25/2012 from the hearing on the Amended Petition for	Minor without the 2590 powers for the Court's signature, or
Aff.Mail	Appointment of Guardian states:	whether the status hearing was
	Aurelli Guerrero is sworn and interprets for	set to coincide with the Petition
Aff.Pub.	Julieta Guerrero and Magdalena	to Determine Succession filed
Sp.Ntc.	Guerrero;	in the Estate of Cuauhtemoc
Pers.Serv.	 The Court dispenses with further notice to 	Guerrero, the father of this
Conf.	the maternal grandmother unless and until	minor (Page 3A and 3B of this
Screen	a U.S. residence becomes known;	calendar.)
Letters	The Court grants the petition subject to	,
Duties/Supp	submission of the Judicial Council form	
Objections	without the 2590 powers.	
Video	Court set status hearing on 6/6/2012.	
Receipt	Order Appointing Guardian of Minor without	
CI Report	the 2590 powers was signed on 5/11/2012.	
9202		
Order	Letters of Guardianship have not issued to	
Aff. Posting	Julieta Guerrero as of 6/1/2012.	Reviewed by: LEG
Status Rpt		Reviewed on: 6/1/12
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 12 - Guerrero

12

Atty Beyer, Jonathan (Pro Per – Administrator)

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD: 7/11/1	10	JONATHAN BEYER was appointed	NEEDS/PROBLEMS/COMMENTS:
		Administrator with full IAEA without bond	
		on 9/15/10.	Minute Order 4-25-12: Examiner Notes
			provided to Administrator. Administrator
Cont. from 0	31412	Inventory and Appraisal filed 2/28/11	requests a continuance. Matter continued to
042512	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	reflects a total estate value of \$353,473.00,	6-6-12. The Court directs Administrator to file the First Account or Petition for Final
Aff.Sub.\	Wit.	including \$67,773.00 cash, real properties, a	Distribution by 6-6-12.
Verified		vehicle, furnishings and personal effects,	.,
Inventor	ry	and a sole proprietorship ("Boxcar Cafe").	As of 5-31-12, nothing further has been
PTC		On 9/15/11, the court set a status hearing	filed. The following issue remains:
Not.Cred	d.	for filing of the first account or petition for	Need first account current or
Notice o	of	final distribution for 11/9/11.	petition for final distribution.
Hrg			
Aff.Mail		Minute Order from 11/9/2011 states there	
Aff.Pub.	,	were no appearances at the status hearing.	
Sp.Ntc.		The court set the matter for Order to Show	
Pers.Serv	v.	Cause and ordered Jonathan Beyer to be	
Conf. Sci	reen	present on 1/25/12 and have the first	
Letters		account filed.	
Duties/S	Supp	Minute Order from 1/25/12 state the Court	
Objectio	ons	dispenses with the Order to Show Cause.	
Video		Mr. Beyer is directed to file a first account	
Receipt		or petition for final distribution.	
CI Repor	rt	or pention for final distribution.	
9202		On 1/25/12, Mr. Beyer appeared. The	
Order		Court dispensed with the OSC and set	
Aff. Post	ting	further status hearing for filing a first	Reviewed by: skc
Status R	pt X	account or petition for distribution on	Reviewed on: 5-31-12
UCCJEA		3/14/12.	Updates:
Citation			Recommendation:
FTB Noti	ice	On 3/14/12, there was no appearance and	File 13 - Beyer
		the Court set this second Order to Show	
		Cause.	
		On 4 25 42 the 000 and 4	
		On 4-25-12, the OSC was taken off	
		calendar, and the Administrator was	
		directed to file the First Account or Petition	
		for Final Distribution.	

Barrera, Leonor (pro per Administrator)

Probate Status Hearing Re: First Account or Final Distribution

DOD: 9/17/2010	LEONOR BUEVARA DE BERRERA	NEEDS/PROBLEMS/COMMENTS:
	was appointed Administrator with full IAEA and without bond on 1/16/11.	Continued from 4/25/12.
Cont. from 031412,	0111/10/11.	
042512		Need current status report, first
Aff.Sub.Wit.	Minute Order dated 3/1/11	account or petition for final
Verified	amended the order to allow	distribution.
Inventory	only LIMITED IAEA authority.	
PTC		
Not.Cred.	I & A filed on 6/17/11 indicates	
Notice of	the value of the estate is	
Hrg	\$98,000.00 (all real property).	
Aff.Mail		
Aff.Pub.	First account or a petition for	
Sp.Ntc.	final distribution is now due.	
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt	-	
CI Report	-	
Order	-	
Aff. Posting	-	Reviewed by: KT
Status Rpt	-	Reviewed by: K1 Reviewed on: 5/31/12
UCCJEA	1	Updates:
Citation		Recommendation:
FTB Notice		File 14A - Barrera

14A

14B Delmiro Barrera (Estate) Case No. 10CEPR01021

Atty Barrera, Leonor (pro per Administrator)

Order to Show Cause

DC	D: 9/17/2010	LEONOR BUEVARA DE BERRERA Was	NEEDS/PROBLEMS/COMMENTS:
		appointed Administrator with full	
		IAEA and without bond on 1/16/11.	
		1	
Co	ont. from 042512	Minute Order dated 3/1/11	
	Aff.Sub.Wit.	amended the order to allow only	
	Verified	LIMITED IAEA authority.	
	Inventory		
	PTC	1 & A filed on 6/17/11 indicates the	
	Not.Cred.	value of the estate is \$98,000.00 (all	
	Notice of	real property).	
	Hrg	First account or a petition for final	
	Aff.Mail	distribution is now due.	
	Aff.Pub.	distribution is flow doc.	
	Sp.Ntc.	This Order to show cause hearing	
	Pers.Serv.	was set after the Administrator,	
	Conf.	Leonor Barrera failed to appear at a	
	Screen	status hearing (see page 14A). The	
	Letters	Court orders Leonor Barrera to be	
	Duties/Supp	present on 4/25/12. Ms. Berrera is	
	Objections	directed to seek professional help if	
	Video	she is unable to prepare the	
	Receipt	accounting herself, or to contact the Probate Office for further	
	CI Report	information.	
	9202		
	Order	The Order to Show Cause was signed	
	Aff. Posting	on 4/26/12 and mailed to the	Reviewed by: KT
	Status Rpt	Administrator on the same date.	Reviewed on: 5/31/12
	UCCJEA	_	Updates:
	Citation		Recommendation:
	FTB Notice		File 14B - Barrera

14B

Case No. 12CEPR00315

Atty Castro, Ana Maria (Pro Per – Petitioner – Non Relative)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

_	e: 5 0B:10/06/06	TEMPORARY EXPIRES 06/06/2012 – Granted by Judge Nunez	NEEDS/PROBLEMS/COMMENTS:
	75.10/06/06	GENERAL HEARING 06/06/2012	Note: Petitioner is primarily Spanish speaking.
Ccc ✓	Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc.	ANA MARIA CASTRO, non-relative, is Petitioner. Father: HECTOR ARNULFO MURILLO, believed to be deceased, declaration of due diligence filed 04/17/2012. Court dispensed with Notice per minute order dated 04/19/2012. Mother: C. BRISA YUDITH PARRA, declaration of due diligence filed 04/17/2012. Court dispensed with Notice per minute order dated 04/19/2012.	 Need Notice of Hearing Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of the notice or declaration of due diligence for: Manuel Murillo (Paternal grandfather) Ramona Murillo (Paternal grandmother) Maternal grandparents
\frac{1}{\sqrt{1}}	Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202	Paternal grandfather: Manuel Murillo Paternal grandmother: Ramona Murillo Maternal grandfather: Unknown Paternal grandfather: Unknown Petitioner alleges: Minor child has been living with the Petitioner since she was a year and a half. The Mother plotted to kill the child. The Father told the Petitioner to take the child and raise her as her own. Petitioner states that the Father was abducted, later a mutilated body was found and Petitioner.	(Unknown)
√ ✓	Order Aff. Posting Status Rpt UCCJEA Citation FTB Notice	mutilated body was found and Petitioner was told the body was that of the Father. Mother is a prostitute and moves from town to town. DSS Investigator Jennifer Copper's report filed 05/31/2012.	Reviewed by: KT/LV Reviewed on: 06/01/2012 Updates: Recommendation: File 15 - Parra

Atty

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

Case No. 12CEPR00368

DC	D:05/28/2008	JACK NELSON, son and sole heir is petitioner	NEEDS/PROBLEMS/COMMENTS:
		and requests appointment as Administrator without bond.	Need Supplement to Duties and Liabilities per Local Rule 7.10.1.
Co √	Aff.Sub.Wit.	Full IAEA- o.k.	2. #5a(3) of the Petition was not answered regarding registered domestic partner.
	PTC Not.Cred.	Decedent died intestate.	3. #5a(7) or 5a(8) was not answered regarding issue of predeceased child.
✓ 	Aff.Mail Aff.Pub.	Residence: Fresno Published: The Business Journal	Signature on Duties and Liabilities is not dated.
	Sp.Ntc. Pers.Serv. Conf.	Estimated value of the Estate:	Note: If the petition is granted status hearings will be set as follows:
√ √	Screen Letters Duties/Supp ×	Personal property: - \$500.00 Real property: - \$56,700.00 Total: - \$56,700.00	 Friday, November 2, 2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal
	Objections Video Receipt		and • Friday, August 3, 2013 at
✓	CI Report 9202 Order	Probate Referee: Steven Diebert	9:00a.m. in Dept. 303 for the filing of the first account and final distribution.
•			Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
	Aff. Posting]	Reviewed by: KT/LV
	Status Rpt		Reviewed on: 06/01/2012
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 16 - Nelson